



GENERATIONAL WEALTH SPECIALISTS

METRO FUNDING GROUP

ESTATE PLANNING SERVICES AND PRICING GUIDE

metrofundinggroup.org

Basic Will Package

Individual	\$498
Married	\$996

Package Includes:

- Last Will and Testament
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage & Sharing

Living Trust Package

Single or Married Joint	\$1697
Married Separate	\$3000

Package Includes:

- Revocable Living Trust
- Certification of Trust
- Pour-over Wills
- Comprehensive Transfer Document
- One Deed
- Asset Schedule
- Financial Power of Attorney
- Healthcare power of Attorney
- Cloud Storage & Sharing

Additional Costs

Real Estate Retitling per Property	\$247
Death Certificate & Affidavit Recording (With Trust Purchase)	\$50

Estate Planning Steps

1. **Appointment Prep:** You will receive the Estate Planning Appointment Guide to complete, so you are prepared for the first appointment.
2. **Data Input Appointment:** We will ask you questions and guide you through creating the basis of your estate plan.
3. **Document Creation (2 weeks):** Our attorney will review your estate needs and create the legal documents. Your estate planning package will be sent to our office to be reviewed, signed, and notarized during your follow up appointment. In unique situations, our attorney may need to follow up with you to ask clarifying questions.
4. **Execution & Funding:** We will work with you to make sure your estate plan is executed and funded.